



*PORT  
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DE PARIS*

# PORT AUTONOME DE PARIS

**Yves MORIN**

**Louisville – September 18<sup>th</sup> 2007**



# **31<sup>st</sup> PIANC CONGRESS**

## **Estoril – May 2006**

**Working Group n° 31**

**\*\*\*\*\***

**Mission, Organization and Management  
of River Ports**



31<sup>ème</sup> CONGRES DE L'AIPCN

Estoril – mai 2006

Groupe de Travail n° 31

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Organisation et Gestion des Ports Fluviaux

- ⇒ **River ports : a wide range of port structures, in response to a great variety of contexts**
- ⇒ **Drawing up an analytical table of port structures (responses to different contexts) (analytical parameters)**
- ⇒ **Defining the efficiency criteria of these port structures**
- ⇒ **Diagnosis of the strengths and weaknesses of these port structures – Force for change – Threats and opportunities**
- ⇒ **Working group n° 31 : Schedule**





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## ⇒ River ports : A wide range of port structures and contexts

- ◆ A waterside factory which looks after its own supplies and shipments from its own wharves.
- ◆ A quarry operator who manages their own shipments by waterway.
- ◆ A private port operator who develops their logistics platform next to a river.
- ◆ A maritime or river shipowner who develops one or more inland terminals.



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## ⇒ River ports : a wide range of port structures and contexts.

- ◆ A local authority which develops their logistics area next to a river in order to boost employment and tax resources.
- ◆ A State which develops a port, by controlling land use, in order to safeguard the port capacity from local demand for land.
- ◆ A sea port which sets up inland ports.
- ◆ A rail operator in charge of a multimodal hub.





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## ⇒ Drawing up an analytical table of port structures (responses to different contexts).

Analytical parameters

- ◆ In terms of land-use control.
- ◆ In terms of the relative importance of the public and private sectors.
- ◆ In terms of operational control (equipment,...).
- ◆ In terms of the role of the shippers/shipowners/forwarding agents, ...
- ◆ Etc...



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## ⇒ **Defining the efficiency criteria of these responses.**

- ◆ Cost control of port operations.
- ◆ Return on invested capital.
- ◆ Logistics market share, development of activity.
- ◆ Sustainable development.
- ◆ Etc...





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## ⇒ **Diagnosis of the strengths and weaknesses of these port structures.**

- ◆ For 12 à 15 representative examples, cross-tabulation of findings on efficiency compared with the analytical parameters defined.
- ◆ The taking into consideration of forces for change (capital-intensive, technological, etc...).
- ◆ Analyses of threats and opportunities arising from the different types of structures.
- ◆ Future responses.





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## **31<sup>st</sup> WORKING GROUP**

**TODAY**

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# PARIS - FRANCE

## THE SEINE

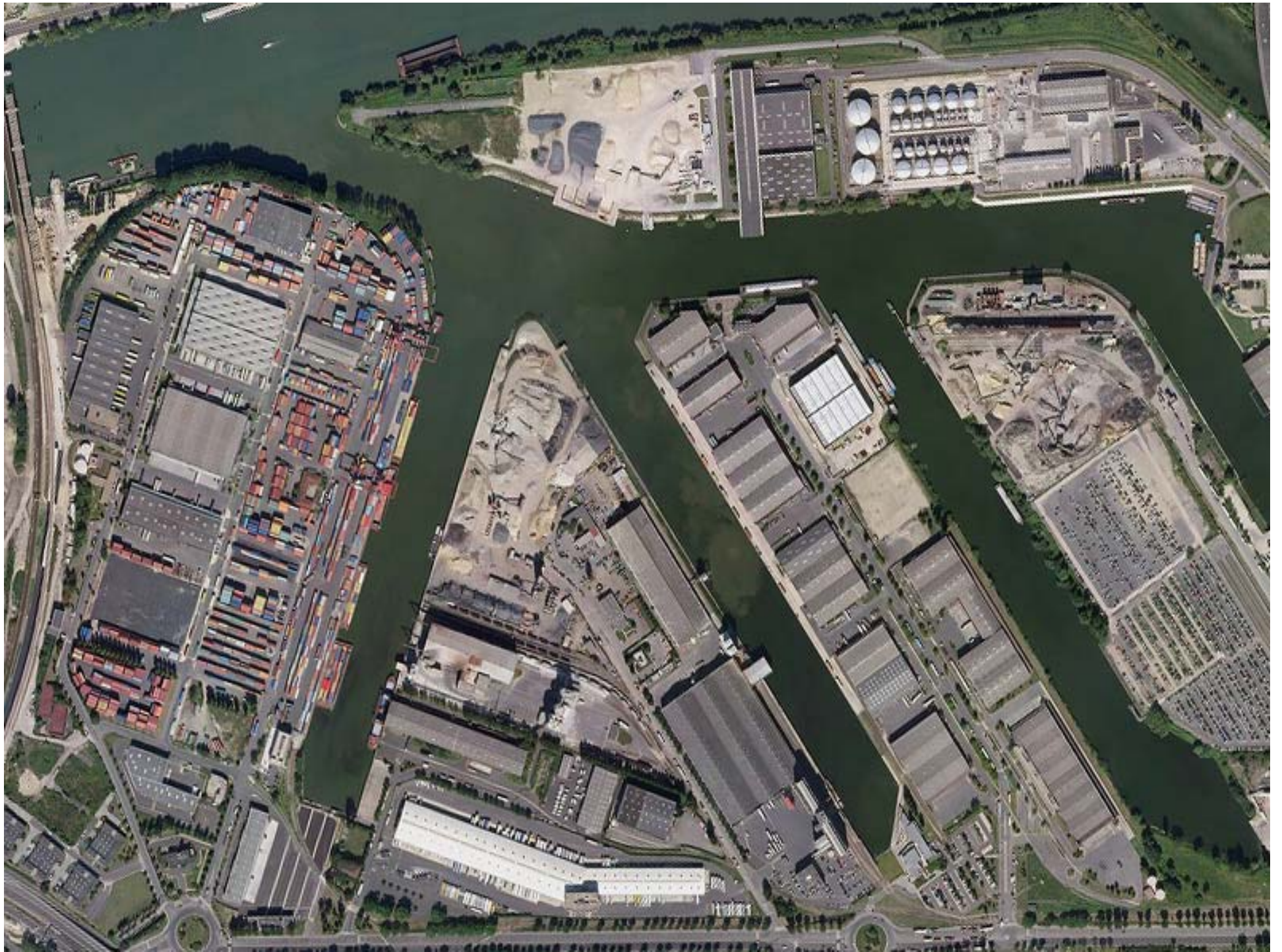
- ♦ The second biggest inland port in Europe.
- ♦ Approx. 50 million TONS Transshipped in public and private ports (50 % - 50 %) (20 million TONS via barges).
- ♦ 70 ports (3 major platforms, as well as many ports within the city)
- ♦ Paris is also the world's largest inland port for passengers :
- ♦ 7 million p.a.
- ♦ 300 000 physical movements of containers p.a.
- ♦ Port of Paris PME (Port Management Establishment) :
  - \* Shareholder : French State
  - \* Revenue € 70 m
  - \* 200 employees
  - \* Land area 1000 hectares

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# DUISBURG - GERMANY

## THE RHINE

- ♦ «The world's biggest inland port ».
- ♦ Approx. 100 million TONS Transshipped in public and private port(50 % - 50 %)  
(50 million TONS via barges).
- ♦ 300 container train links per week, especially to and from the North Sea Ports.
- ♦ 1.3 million physical movements of containers p.a.
- ♦ Port of Duisbourg (PME) :
  - \* Shareholder (1/3 each) Federal Republic, State of North Rhine-Wesphalia and city of Duisbourg
  - \* Revenue € 120 m
  - \* 500 employees
  - \* Land area 1350 hectares
  - \* Facilities :
    - 4 container terminals
    - 5 coal mulloading terminals
    - 8 covered loading / discharging points
    - 5 Steel Service Centers
    - 2 Roll-on / Roll-offs

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# The Port of Duisburg



## The Figures tell its own story...

- The world's biggest inland port:
  - ▶ Approx. 100 million tonnes are transshipped in the public ports and the 7 private ports p.a.
- Most important hinterland hub for the North Sea Ports:
  - ▶ Network of over 300 combined transportation train links per week
- The world's largest inland container port:
  - ▶ 787,000 TEU transshipped in 2006 – equivalent to 1.3 million moves (sea ports' standard)
- One of the leading logistics locations in Europe:
  - ▶ 50 new settlements within the last seven years





- **3 Logistics Centers**

- ▶ 1.2 million sq.m. roofed storage area – doubled within the last six years

- **4 Container Terminals:**

- ▶ Capacity: 1.0 million TEU (2010: 2.0 million TEU)

- **Distribution to Central European markets by major German and non-German logistics service providers, e.g.:**

- |                      |                      |
|----------------------|----------------------|
| ▶ Schenker (DE)      | ▶ Kühne+Nagel (CH)   |
| ▶ NYK Logistics (JP) | ▶ DHL (DE)           |
| ▶ Geodis (FR)        | ▶ Gökboro (TR)       |
| ▶ Hellmann (DE)      | ▶ Gefco (FR)         |
| ▶ Seacon (NL)        | ▶ Vos Logistics (NL) |
| ▶ Wincanton (GB)     | ▶ and others         |



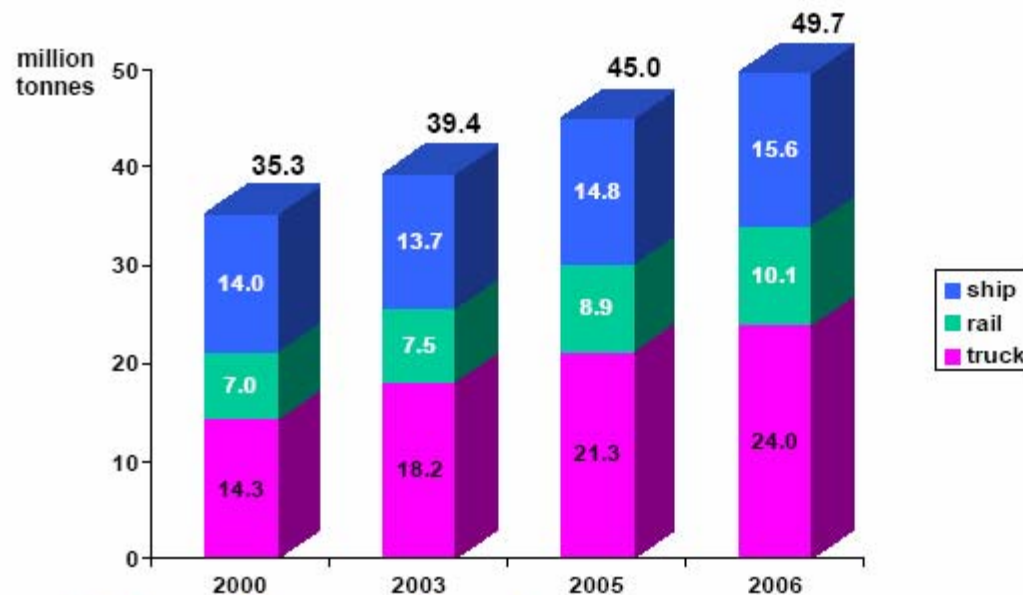
- > **Generation of cargo flows and added value**



## Development of Transshipment Modal Split



- Total transshipment of the public ports (duisport) and 7 private ports:  
Approx. 100 million tonnes by ship, rail and truck; thereof duisport: 50 Mio. tonnes



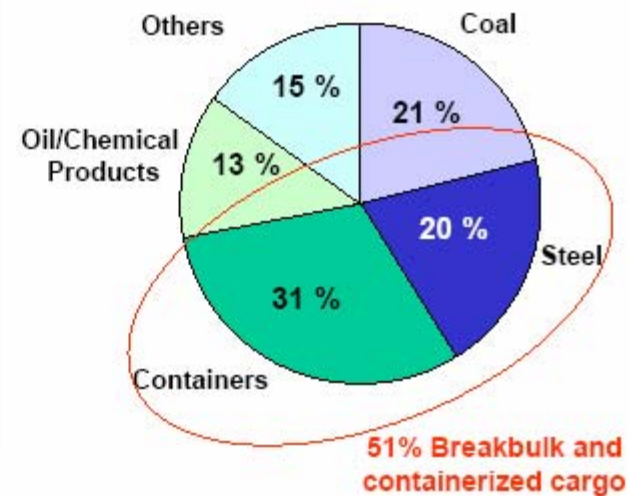
> Rail is gaining market shares



## Transshipment 2006

- Total transshipment of the public ports (duisport) and 7 private ports:  
Approx. 100 million tonnes p.a.

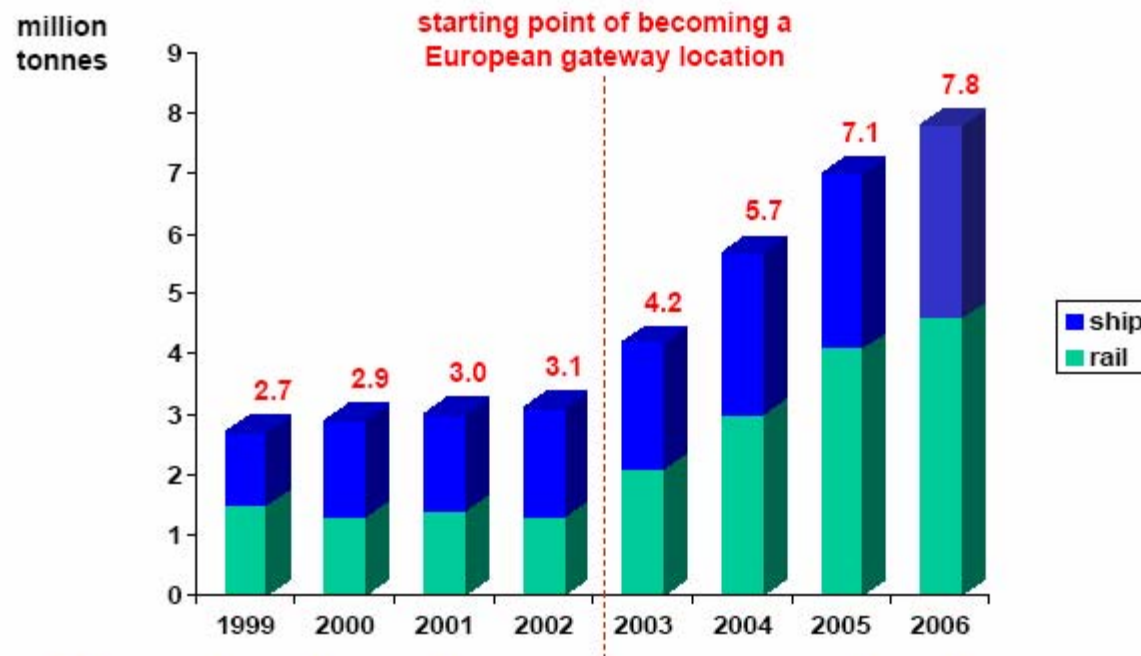
duisport transshipment:		
	<u>2005</u>	<u>2006</u>
Ship cargo	14.8	15.6
Rail cargo	8.9	10.1
<b>Intermediate result</b>	<b>23.7</b>	<b>25.7</b>
Truck cargo	21.3	24.0
<b>Total cargo</b>	<b>45.0</b>	<b>49.7</b>



- > Major hub for containers, steel and coal in the hinterland of the sea ports



## Development of Container Transshipment



> duisport bundles and sorts cargo streams for the sea ports and serves as gateway to the European hinterland



## Short Sea Traffic

- Scheduled Short Sea shipping links mainly to the United Kingdom, Scandinavia and the Iberian peninsula
- Some 2 million tonnes of cargo loaded and unloaded by approx. 2,000 sea-going barges in Duisburg each year
- 10 Short Sea shipping companies operate container line services from Duisburg
- 50,000 TEU p.a. by direct container line service to the United Kingdom (London area)
- „Top 5“-Relations:
  - ▶ UK (Tilbury, Goole)
  - ▶ Norway (Bergen)
  - ▶ Spain (Barcelona)
  - ▶ Denmark (Kolding)
  - ▶ Lithuania (Klaipeda)



Status: May 2007



# BASEL - SWISS

## THE RHINE

- ♦ Approx. 15 million Tons transshipped p.a. (7 million Tons via barges).
- ♦ 70 per cent of the river tonnage to or from trains.
- ♦ Port platforms and terminals close to or within urban zones.
- ♦ Unique Swiss trimodal platform.
- ♦ Including ports of «WEIL AM RHEIN » (Germany) and Mulhouse - Ottsmarshein (France) the river traffic totals 13 million Tons.
- ♦ 88 000 containers transshipped from river.
- ♦ Port of Bassel (PME) :
  - \* Shareholder : 2 cantons of Basel
  - \* Land area 120 hectares
  - \* Board team : 5 - The president come from financial sector
  - \* Important Equipment for rail transport

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# VIENNA - AUSTRIA

## THE DANUBE

- ♦ Approx. 11 million TONS transshipped in public port of Vienna (1 million TONS via barges).
- ♦ 200 000 physical movements of containers p.a.
- ♦ Warehouse capacity 7 hectares
- ♦ Port of Vienna (PME) :
  - \* Shareholder city of Vienna.
  - \* Land area managed : 350 hectares.
  - \* Port of Vienna operates Solely container car terminal (car terminal equipped by a silo).
  - \* 200 employees.

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## KREMS - AUTRIA

### THE DANUBE

- ♦ Approx. 2 million TONS transshipped (0,4 million TONS via barges).
- ♦ Port activities - in the majority - managed directly by PME which has rented the land from 1935 until 2062.
- ♦ Cranes, warehouses, railroads, container terminal.
- ♦ Port of Krems (PME) :
  - \* Shareholder : private.
  - \* Land area managed : 25 hectares.

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## OTHER PORTS TO BE STUDIED

Pittsburg (USA)

Memphis (USA)

Luxembourg (Luxembourg)

Rotterdam (Netherlands)

Strasbourg (France)

Londres (UK)

Belgrade (Serbia)

Liège (Belgium)

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# 1 - LAND OWNERSHIP

PARIS (France) } Globally speaking, 50 % of waterway traffic  
DUISBURG (Germany) } comes from private land, 50 % from public land.

VIENNA (Austria) }  
KREMS (Austria) } Public ownership (municipalities of Vienna, Krems  
BASEL (Swiss) } and Bassel)

A European historical tendency towards public (state or cities) ownership  
Of the land.

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## 2- STATUS OF THE PME (Port Managing Establishment)

- ♦ Ports managed through mix of public and private (Krems an exception : managed privately).
- ♦ Private + public permits variety of business approaches.
- ♦ Basel - previously run directly by government ministry - from 2008 will be run by state company (on - going reforms).
- ♦ Duisbourg, Vienna and Paris managed by state companies.
- ♦ Paris managed with important influence of the national state (French), others with mainly local influence.

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## 3- LAND USE

- ♦ 3 Types of use for land plots :
  - A) Company for river-handling of cargo belonging to other companies.
  - B) Company for river-handling of its own-cargo.
  - C) Company for other logistic activities than barges (truck to truck or truck to train).
- ♦ The more the port is mainly used by type A, the more global it is as a River Transit Port (including a large hinterland).
- ♦ The more the port is mainly used by type B, the more connected it is to the local community.
- ♦ The more the port is mainly used by type C, the more it is a logistic platform without important link with the river.
- ♦ Within this definition, Basel is typically categorie A, Duisbourg and Paris category B.

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## 4 -REAL ESTATE

- ♦ The five ports of Duisburg, Paris, Basel, Vienna and Krems developed capacity of warehousing.
- ♦ Ports of Duisburg and Paris offer more than 1 million Sq. m. each ; 40 % of there belongs to the PME in Paris and 20 % in Duisburg.
- ♦ PME of Vienna solely operates its warehousing (70.000 Sq. m.) and is owner and directly operates its car terminal.

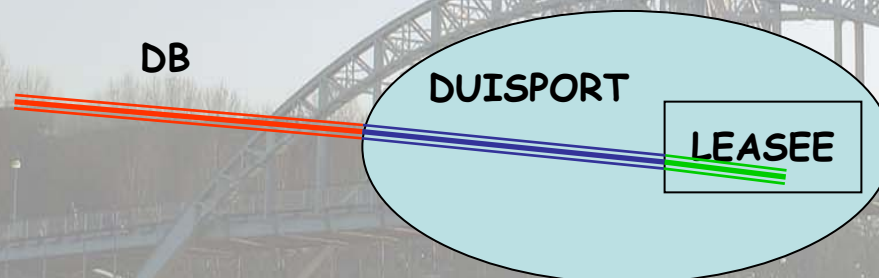
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## 5- INFRASTRUCTURE OWNERSHIP

- ♦ In general, in the public part of the ports, infrastructures belongs to PME (rail, roads, quays, platforms)
- ♦ Exception = platforms especially in Paris, Duisburg, Basel belong to the leasee.
- ♦ Railroads belongs to national operator, PME and leasee

Duisburg example :



- ♦ Past 2009, this will be the case for Paris.

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## 6 - SUPERSTRUCTURE OWNERSHIP

### 6.1 - CONTAINER TERMINALS

#### ♦ DUISBURG

4 Terminals.

1 Terminal belongs to « PME » and is leased to an operator.

3 Terminals belong to inland and maritime handling operators.

1 (future) terminal will belong to a maritime ship owner and a sea-port handling operator.

#### ♦ PARIS

3 Terminals.

2 Terminals belong partly to PME.

1 Terminal belongs to a sea-port handling operator and a river transport company.

#### ♦ BASEL

The terminals belong to international inland logistic operators.

#### ♦ VIENNA and KREMS

The terminals belong to the PME.





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## 6 - SUPERSTRUCTURE OWNERSHIP

### 6.2 - OTHER TERMINALS

- ♦ DUISBURG - Many terminals are leased to a lot of logistic companies (steel, heavy parcels, coal, diverse goods, etc...).
- ♦ It is also the case in Basel and Paris, but for some terminals.
- ♦ In Vienna and Krems, the terminals are belonging to PME and operated by itself.

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## 7 - LAND LEASES

- ♦ Who, globally, rent the land managed by the PME ?  
(Shippers, River operators, general international logistic operators, local specific operators).
- ♦ Duisburg : 50 % Tradition Industries, present at the origin of the port, basis of cargoes transshipped and carried.  
50 % International logistic operators, also present in the seaports and overseas in the world.
- ♦ Basel : Mainly international logistic and transit companies.
- ♦ Paris : Building sector, waste industry, steel industry etc... Leisure and passengers transport by river logistic companies.
- ♦ Vienna and Krems : Diverse logistic companies.

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## 8 - RAIL TRANSPORT

- ♦ Rail transport in Europe is changing : From a system of subsidized national monopolies towards a competition between international private operators.
- ♦ Duisburg increases its role of rail hub in Europe : already 12 daily container shuttles by rail between Duisburg and 8 european sea-ports.  
The PME of Duisburg is largely involved in this developpment, being even shareholders of the local shuttle company. More than 10 rail transport companies already operates in Duisburg.
- ♦ Basel : PME operates the railroads of the Port. As a result of strategy of Swiss State, 70 % of river tonnages go to or from rail.
- ♦ In Paris, the opening of competition between train operators is recent, and give an hope of a futur increase of traffic.

## 9 - KEY FACTORS FOR SUCCESS

- ♦ State control of the land to keep its use for general interest ?
- ♦ More private influence for a better management ?
- ♦ A Port Management Establishment more powerful, a guarantee of coherence ?
- ♦ Ability to attract many logistic companies, even if it reduces the influence of the PME ?
- ♦ Promote long term leasing of the land by industries or keep capability for frequent turnover of the use of it to be able to offer space for new customers ?
- ♦ Etc...

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